AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Marks, Emily C.	U.S. District Court for the Middle District of Alabama	08/12/2023
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final	01/01/2022 **to** 12/31/2022
	5b. ☐ Amended Report	
7. Chambers or Office Address		
United States Courthouse One Church Street Montgomery, Alabama 36104		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Board Member	The Johnson Institute
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2022	Self-employed (staffing executive)
2.		
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☐ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	George Mason University Center for Law & Economics	July 23-31 2022	London, England	Judicial Seminar	Transportation, meals, lodging
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
1. Individual Assets (H)									
2. ServisFirst (cash)	A	Interest	K	T					
3. Wells Fargo (cash)	A	Interest	L	T					
4. ServisFirst JobMarks, Inc. Operating Account (cash)		None			Closed	06/20/22	M		
5. ServisFirst JobMarks, Inc. Payroll Account (cash)		None			Closed	06/20/22	K		
6. ServisFirst ZeldaMarks, LLC Cash Account (cash) (Y)									
7. JobMarks, Inc.	B	Dividend			Sold	06/20/22	M	G	
8. Rental Property #1, Montgomery, Alabama	E	Rent			Sold	09/02/22	N	G	
9. Promissory Note - AnDek Holdings, Inc.	A	Interest	M	T	Open	06/20/22	M		
10. Account #1 (H)									
11. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	K	T	Sold (part)	11/30/22	L		
12.					Buy (add'l)	12/09/22	J		
13.					Sold (part)	12/21/22	J		
14.					Buy (add'l)	12/29/22	J		
15. Fidelity Contrafund (FCNTX)	D	Dividend	M	T	Sold (part)	10/31/22	M	E	
16.					Buy (add'l)	12/21/22	K		
17. Fidelity SAI Inflation Focused Fd (FIFGX)		None			Buy	10/31/22	K		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

	A	B		C		D				
	Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
	Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
18.						Sold	12/21/22	K	A	
19.	Strategic Advisers Large Cap Fund (FALCX)	B	Dividend	M	T	Buy	10/31/22	M		
20.						Buy (add'l)	12/30/22	J		
21.	Strategic Advisers Emerging Markets (FSAMX)	C	Dividend	M	T	Buy	10/31/22	M		
22.						Sold (part)	12/21/22	J	A	
23.						Buy (add'l)	12/30/22	J		
24.	Strategic Advisers International Fund (FILFX)	C	Dividend	M	T	Buy	10/31/22	M		
25.						Sold (part)	12/30/22	J	A	
26.	Amana Mutual Trust Fund Growth (AMAGX)	A	Dividend			Sold (part)	10/31/22	K	E	
27.						Sold	12/30/22	J	D	
28.	Hartford Growth Oppertunity Class A (HGOAX)		None	K	T	Buy	12/21/22	K		
29.	Strategic Advisers Core Income Fund (FPCIX)	A	Dividend	L	T	Buy	10/31/22	M		
30.						Buy (add'l)	12/21/22	L		
31.						Buy (add'l)	12/30/22	K		
32.	Fidelity SAI US Treasury Bond Index (FUTBX)	A	Dividend	L	T	Buy	10/31/22	K		
33.						Sold (part)	12/21/22	J	A	
34.						Sold (part)	12/30/22	J	A	

1 Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2 Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

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☐ NONE *(No reportable income, assets, or transactions.)*

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
35. Fidelity Total Mkt Index Premium Cl (FSKAX)	A	Dividend			Sold	10/31/22	M	F	
36. Fidelity Strategic Dividend & Income (FSDIX)	A	Dividend			Sold	10/31/22	K	E	
37. Janus Henderson Triton T (JATTX)		None			Sold	10/31/22	L	F	
38. MFS International Diversification Fd A (MDIDX)		None			Sold	12/21/22	K	C	
39. Fidelity Total Bond (FTBFX)	A	Dividend			Sold	12/21/22	K	C	
40. Loomis Sayles Bond Retail Shares (LSBRX)	A	Dividend			Sold	10/31/22	K	C	
41. TCW Total Return Bond Class N (TGMNX)	A	Dividend			Sold	12/21/22	J	A	
42. TCW Core Fixed Income Class N (TGFNX)	A	Dividend			Sold (part)	12/21/22	J		
43.					Sold	12/30/22	K	C	
44. Thompson Bond Fund (THOPX)	A	Dividend			Sold	10/31/22	K	C	
45. Account #2 (H)									
46. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	J	T	Buy	11/01/22	J		
47. Strategic Advisers Large Cap Fund (FALCX)	A	Dividend	K	T	Buy	10/31/22	K		
48. Strategic Advisers Emerging Markets (FSAMX)	A	Dividend	J	T	Buy	10/31/22	J		
49.					Sold (part)	12/21/22	J	A	
50. LSV Small Cap Value Fund Investor (LVAQX)	A	Dividend	J	T	Buy	12/21/22	J		
51. John Hancock Classic Value CL (PZFVX)	A	Dividend	J	T	Buy	10/31/22	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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52. Fidelity Low Priced Stock (FLPSX)	B	Dividend			Sold	10/31/22	J	D	
53. Janus Henderson Triton T (JATTX)		None			Sold	10/31/22	K	D	
54. Fidelity US Bond Index Fund (FXNAX)	A	Dividend			Sold (part)	10/31/22	J	B	
55.					Sold	12/21/22	J	A	
56. Account #3 (H)									
57. Vanguard 500 Index Fund Adm (VFIAX)	B	Dividend	L	T					
58. Account #4 (H)									
59. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	K	T	Buy (add'l)	02/02/22	J		
60.					Buy (add'l)	03/04/22	J		
61.					Buy (add'l)	04/01/22	J		
62.					Buy (add'l)	04/29/22	J		
63.					Sold (part)	11/01/22	M		
64.					Buy (add'l)	12/21/22	K		
65.					Sold (part)	12/22/22	K		
66.					Buy (add'l)	12/29/22	J		
67. Fidelity Intl Enhanced Idex Fund (FIENX)	A	Dividend			Sold	12/09/22	J	A	
68. Fidelity SAI Inflation-Focused Fund (FIFGX)		None			Buy	10/31/22	K		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

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69.					Sold	12/21/22	K		
70. Strategic Advisers Large Cap Fund (FALCX)	A	Dividend	L	T	Buy	10/31/22	L		
71. Fidelity Strategic Advisors Emerging Markets Fund (FSAMX)	B	Dividend	L	T	Buy	10/31/22	L		
72.					Sold (part)	12/21/22	J	A	
73.					Buy (add'l)	12/30/22	J		
74. Strategic Advisers International Fund (FILFX)	C	Dividend	M	T	Buy	10/31/22	M		
75.					Sold (part)	12/30/22	J	A	
76. Fidelity US Bond Index Fund (FXNAX)	A	Dividend			Sold (part)	10/31/22	M		
77.					Sold (part)	12/21/22	K		
78.					Sold	12/30/22	J	D	
79. Fidelity Total Bond (FTBFX)	A	Dividend			Sold	12/21/22	K	A	
80. Strategic Advisers Core Income Fund (FPCIX)	A	Dividend	L	T	Buy	10/31/22	J		
81.					Buy (add'l)	12/21/22	L		
82.					Buy (add'l)	12/30/22	K		
83. Fidelity SAI U.S. Treasury Bond Index Fund (FUTBX)	A	Dividend	K	T	Buy	10/31/22	K		
84.					Sold (part)	12/21/22	J	A	
85.					Sold (part)	12/30/22	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000	
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2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000		
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000		
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86.	iShares MSCI USA Momentum Factor ETF (MTUM)	A	Dividend	L	T	Buy	10/31/22	L		
87.						Buy (add'l)	12/21/22	K		
88.	Pimco Income Fund Cl A (PONAX)	A	Dividend			Sold	10/31/22	K	D	
89.	Eaton Vance Floating Rate Advantage Cl A (EAFAX)	A	Dividend			Sold	10/31/22	K	C	
90.	Janus Henderson Short-Term Bond T (JASBX)	A	Dividend			Sold	10/31/22	K	A	
91.	Thompson Bond Fund (THOPX)	A	Dividend			Sold	10/31/22	K	C	
92.	Account #5 (H)									
93.	Fidelity Government Cash Reserves (FDRXX) (cash eq.)	B	Dividend	K	T	Sold (part)	11/30/22	M		
94.						Buy (add'l)	12/20/22	J		
95.						Buy (add'l)	12/21/22	J		
96.						Buy (add'l)	12/29/22	J		
97.	Strategic Advisers Large Cap Fund (FALCX)	B	Dividend	M	T	Buy	11/01/22	M		
98.	Fidelity Strategic Advisors Emerging Markets Fund (FSAMX)	B	Dividend	L	T	Buy	11/01/22	L		
99.						Sold (part)	12/21/22	K	A	
100.						Buy (add'l)	12/30/22	J		
101.	Strategic Advisers Core Income Fund (FPCIX)		None	J	T	Buy	12/30/22	J		
102.	John Hancock Classic Value Fund (PZFVX)	D	Dividend	K	T	Buy	11/01/22	K		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
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A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
103. LSV Small Cap Value Fund (LVAQX)	A	Dividend	K	T	Buy	12/21/22	K		
104. Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX)	A	Dividend	J	T	Buy	11/01/22	J		
105. Fidelity US Bond Index Fund (FXNAX)	B	Dividend			Sold (part)	10/31/22	K		
106.					Sold (part)	12/21/22	K	A	
107.					Sold	12/30/22	J		
108. Account #6 (H)									
109. Fidelity Government Money Market Fund (SPAXX) (cash eq.)	D	Dividend			Buy (add'l)	01/10/22	J		
110.					Sold (part)	01/19/22	K		
111.					Buy (add'l)	02/10/22	J		
112.					Buy (add'l)	03/10/22	J		
113.					Buy (add'l)	04/11/22	J		
114.					Buy (add'l)	05/09/22	M		
115.					Buy (add'l)	05/10/22	J		
116.					Buy (add'l)	05/13/22	M		
117.					Sold (part)	06/01/22	M		
118.					Buy (add'l)	06/10/22	J		
119.					Buy (add'l)	06/23/22	M		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
120.					Buy (add'l)	06/28/22	M		
121.					Buy (add'l)	07/01/22	M		
122.					Buy (add'l)	07/07/22	M		
123.					Buy (add'l)	07/11/22	J		
124.					Sold (part)	09/14/22	P1		
125.					Buy (add'l)	09/20/22	M		
126.					Sold (part)	09/23/22	M		
127.					Buy (add'l)	09/30/22	J		
128.					Buy (add'l)	10/05/22	L		
129.					Buy (add'l)	10/18/22	K		
130.					Sold	10/21/22	M		
131. FIMM Money Market Portfolio (FMPXX) (cash eq.)	D	Dividend	M	T	Buy	09/14/22	P1		
132.					Buy (add'l)	09/23/22	M		
133.					Sold (part)	09/26/22	L		
134. Account #7 (H)									
135. Fidelity Government Money Market Fund (SPAXX) (cash eq.)	B	Interest			Buy (add'l)	02/04/22	L		
136.					Buy (add'l)	04/19/22	K		

1 Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2 Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3 Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
137.					Sold (part)	10/24/22	M		
138.					Buy (add'l)	10/25/22	M		
139.					Sold	10/25/22	M		
140. FIMM Money Market Portfolio (FMPXX) (cash eq.) (X)	D	Dividend	P1	T	Sold (part)	12/28/22	L		
141. AON Plc Shs Cl A Com (AON)	A	Dividend			Sold	04/19/22	J	A	
142. Accenture PLC (ACN)	A	Dividend			Sold	04/19/22	J	B	
143. Eaton Corp PLC Com (ETN) (Y)									
144. Adobe Inc Com (ADBE)		None			Sold	10/21/22	J	A	
145. Advanced Micro Devices Inc (AMD) (Y)									
146. Alphabet Inc Cl C (GOOG)		None			Sold	02/04/22	J	C	
147. Alphabet Inc Cl A (GOOGL)		None			Sold	02/04/22	J	C	
148. Amazon.Com Inc (AMZN)		None			Sold	02/04/22	J	C	
149. American Tower Corporation (AMT)	A	Dividend			Sold	10/21/22	J	A	
150. Amgen Inc (AMGN)	A	Dividend			Sold	04/19/22	J	A	
151. Applied Materials Inc Com (AMAT)	A	Dividend			Sold	10/21/22	J	A	
152. Bank of America Corp (BAC)		None			Sold	02/04/22	J	B	
153. Blackstone Inc (BX)		None			Sold	02/04/22	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000	
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000		
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000		
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000		
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000			
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Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
154. Boeing Co Com US (BA) (Y)									
155. Bristol Myers Squibb (BMY)	A	Dividend			Sold	04/19/22	J	A	
156. Broadcom Inc (AVGO)	A	Dividend			Sold	10/21/22	J	A	
157. Cadence Design Systems Inc Com (CDNS) (Y)									
158. Charter Communications Inc (CHTR) (Y)									
159. Chevron Corp New Com (CVX)		None			Sold	02/04/22	J	A	
160. Cisco Sys Inc Com (CSCO)	A	Dividend			Sold	10/21/22	J	A	
161. Coca Cola Co (KO)		None			Sold	02/04/22	J	A	
162. Conocophillips Com (COP)	A	Dividend			Sold	02/04/22	J	B	
163. Costco Corp (COST)	A	Dividend			Sold	04/19/22	J	B	
164. Danaher Corp (DHR)	A	Dividend			Sold	10/21/22	J	B	
165. Disney Walt Co (DIS)		None			Sold	10/21/22	J		
166. Eli Lilly and Company (LLY)		None			Sold	10/21/22	J	C	
167. Emerson Electric Co (EMR)	A	Dividend			Sold	10/21/22	J	A	
168. Exxon Mobil (XOM)		None			Sold	02/04/22	J	B	
169. First Republic Bank San Francisco Com (FRC) (Y)									
170. Fortinet Inc Com (FTNT)		None			Sold	04/19/22	J	B	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
171. HCA Healthcare In Com (HCA)	A	Dividend			Sold	04/19/22	J	A	
172. Home Depot Inc Com (HD)	A	Dividend			Sold	10/21/22	J	B	
173. Huntington Bancshares Inc Com (HBAN) (Y)									
174. Intel Corp (INTC) (Y)									
175. Intuit.com (INTU)	A	Dividend			Sold	10/21/22	J	B	
176. KLA Corp Com New (KLAC) (Y)									
177. Lam Research Corp Com (LRCX)	A	Dividend			Sold	10/21/22	J	A	
178. Estee Lauder Companies Inc Com (EL) (Y)									
179. Lockheed Martin Corp (LMT)		None			Sold	02/04/22	J	A	
180. MSCI Inc Com (MSCI)	A	Dividend			Sold	10/21/22	J	A	
181. Marriott International Inc Cl A (MAR)	A	Dividend			Sold	10/21/22	J	A	
182. Mastercard Incorporated Cl A (MA)	A	Dividend			Sold	02/04/22	J	B	
183. Merck & Co Inc New Com (MRK)	A	Dividend			Sold	10/21/22	J	A	
184. Meta Platforms Inc Cl A Common Stock (FB)		None			Sold	10/21/22	J	A	
185. Metlife Inc Com (MET)		None			Sold	02/04/22	J	A	
186. Microsoft Corp (MSFT)		None			Sold	02/04/22	K	D	
187. Micron Technology (MU)	A	Dividend			Sold	10/21/22	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market		

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Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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188. Moodys Corp Com (MCO) (Y)									
189. Netflix Com Inc Com (NFLX)	A	Dividend			Sold	10/21/22	J		
190. Nike Inc. (NKE)	A	Dividend			Sold	10/21/22	J	A	
191. Northrop Grumman Corp (NOC)	A	Dividend			Sold	10/21/22	J	B	
192. Nucor Corp Com (NUE)	A	Dividend			Sold	10/21/22	J	A	
193. Nvidia Corp (NVDA)	A	Dividend			Sold	10/21/22	J	B	
194. Oracle Corp (ORCL)	A	Dividend			Sold	10/21/22	J	A	
195. Paypal Hldgs Inc Com (PYPL)	A	Dividend			Sold	10/21/22	J	A	
196. Pepsico Inc (PEP)	A	Dividend			Sold	02/04/22	J	A	
197. Pfizer Inc (PFE)	A	Dividend			Sold	10/21/22	J	A	
198. Price T Rowe Groups Com (TROW) (Y)									
199. Prologis, Inc. (PLD)	A	Dividend			Sold	10/21/22	J	A	
200. Qualcomm Inc (QCOM)		None			Sold	02/04/22	J	B	
201. Regions Financial Corp New Com (RF)	A	Dividend			Sold	10/21/22	J	A	
202. Rockwell Automation Inc Com (ROK) (Y)									
203. S&P Global Inc Com (SPGI)	A	Dividend			Sold	10/21/22	J	A	
204. Salesforce Com Inc (CRM)		None			Sold	10/21/22	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
205. Schlumberger Limited Com (SLB)	A	Dividend			Sold	02/04/22	J	A	
206. Sherwin Williams Co (SHW) (Y)									
207. Southern Co (SO)	A	Dividend			Sold	10/21/22	J	A	
208. SVB Financial Group Com (SIVBQ) (Y)									
209. Target (TGT)	A	Dividend			Sold	10/21/22	J	A	
210. Tesla Inc Com (TSLA)		None			Sold	10/21/22	J	C	
211. Thermo Fisher Scientific (TMO)	A	Dividend			Sold	10/21/22	J	A	
212. 3M Co (MMM) (Y)									
213. Union Pacific Corp (UNP) (Y)									
214. Unitedhealth Group (UNH)	A	Dividend			Sold	10/21/22	J	C	
215. Visa Inc Com Cl A (V)	A	Dividend			Sold	10/21/22	J	A	
216. Zoetis Inc (ZTS) (Y)									
217. Crown Castle Inl Corp New Com (CCI) (Y)									
218. Account #8 (H)									
219. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	M	T	Buy	10/24/22	N		
220.					Buy (add'l)	10/25/22	M		
221.					Buy (add'l)	11/01/22	O		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
222.					Sold (part)	11/01/22	L		
223.					Sold (part)	11/01/22	O		
224.					Buy (add'l)	12/16/22	J		
225.					Buy (add'l)	12/19/22	J		
226.					Buy (add'l)	12/21/22	K		
227.					Sold (part)	12/22/22	K		
228.					Buy (add'l)	12/23/22	J		
229.					Buy (add'l)	12/28/22	L		
230.					Buy (add'l)	12/30/22	J		
231. FIMM Money Market Portfolio (FMPXX) (cash eq.) (X)	A	Dividend			Sold (part)	11/01/22	M		
232.					Sold	12/21/22	J		
233. Fidelity 500 Index Fund (FXAIX)	D	Dividend	O	T					
234. Fidelity Small Cap Index Fund (FSSNX)	B	Dividend	M	T	Sold (part)	11/01/22	L	E	
235. Fidelity Mid Cap Index Fund (FSMDX)	C	Dividend	M	T	Sold (part)	12/16/22	J	B	
236. Fidelity Blue Chip Growth (FBGRX)		None			Buy	09/26/22	L		
237.					Sold (part)	11/01/22	L	A	
238.					Sold	12/16/22	K		

1 Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2 Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3 Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
239. LSV Value Equity Fund (LVAEX)	D	Dividend	K	T	Buy	11/01/22	L		
240.					Sold (part)	12/21/22	K		
241. Oakmark Fund (OAKMX)	A	Dividend	L	T	Buy	11/01/22	K		
242.					Buy (add'l)	12/30/22	L		
243. Oakmark International Fund (OAKIX)	C	Dividend	L	T	Buy	11/01/22	L		
244. Principal Blue Chip Fund Class A (PBLAX)		None	L	T	Buy	12/21/22	L		
245. Fidelity Value Fund (FDVLX)		None			Buy	01/19/22	K		
246.					Sold	11/01/22	K	B	
247. MFS Internatioal Diversification FD A (MDIDX)	A	Dividend			Sold (part)	11/01/22	M		
248.					Sold	12/21/22	J		
249. Vanguard Health Care Investor (VGHCX)	B	Dividend	J	T	Sold (part)	11/01/22	K	C	
250. Strategic Advisers Municipal Bond Fund (FSMUX)	A	Dividend	M	T	Buy	11/01/22	M		
251. iShares Core S&P 500 ETF (IVV)	B	Dividend	N	T	Buy	11/02/22	N		
252.					Buy (add'l)	12/30/22	K		
253. iShares MSCI EAFE ETF (EFA)	A	Dividend	M	T	Buy	11/02/22	M		
254.					Buy (add'l)	12/22/22	K		
255. iShares Core S&P Small-Cap ETF (IJR)		None	K	T	Buy	12/22/22	K		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
256. iShares MSCI EAFE Min Vol Factor ETF (EFAV)	A	Dividend	K	T	Buy	11/02/22	K		
257.					Buy (add'l)	12/30/22	K		
258. iShares MSCI USA Quality Factor ETF (QUAL)	A	Dividend	M	T	Buy	11/02/22	M		
259.					Buy (add'l)	12/30/22	K		
260. Fidelity US Bond Index Fund (FXNAX)	C	Dividend			Sold	11/01/22	M		
261. BlackRock Strategic Muni Opprotunities A (MEMTX)	C	Dividend			Sold	11/01/22	L		
262. T Rowe Price Inflation Port Bd Fd (PRIPX)	D	Dividend			Sold	11/01/22	M		
263. Account #9 (H)									
264. Prattville Ala Wtr Wks Brd Wtr Rev Bds 2018 (740053HP1)		None	K	T					
265. Account #10 (H)									
266. Alabama's 529 Vanguard Age-Based Aggressive Portfolio 11-12		None			Sold	05/06/22	M		
267. Alabama's 529 Vanguard Age-Based Aggressive Portfolio 13-14		None	M	T	Buy	05/06/22	M		
268. Account #11 (H)									
269. Alabama's 529 Vanguard Age-Based Aggressive Portfolio 11-12		None	M	T					
270. Account #12 (H)									
271. Fidelity Cash (cash)	A	Interest	K	T					
272. Fidelity Contrafund (FCNTX)	D	Dividend	M	T					

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
273. Ishares Core S&P 500 ETF (IVV)	A	Dividend	K	T					
274. Account #13 (H)									
275. Fidelity Cash (cash)	A	Interest	K	T					
276. Fidelity Contrafund (FCNTX)	D	Dividend	M	T					
277. Ishares Core S&P 500 ETF (IVV)	A	Dividend	K	T					

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 45 of the filing instructions.

Name of Person Reporting	Date of Report
Marks, Emily C.	08/12/2023

IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Emily C. Marks

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 13106)

Committee on Financial Disclosure
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